



# **SUCCESSFULLY EMPLOYING YOUR PERSONAL ASSISTANTS**

**A Workshop Series for People with Disabilities**

## **PARTICIPANT HANDOUTS**

### **Workshop III, Session 4**

#### ***Preparing to Staff:***

- ★ **Making a Staffing Plan**
- ★ **Developing a PA Schedule**
- ★ **Interviewing Candidates**

## Sources to Recruit PAs: Ideas from Homework

**NAME:** \_\_\_\_\_

**How to Recruit There:** \_\_\_\_\_

**Whom to Contact:** \_\_\_\_\_

**Phone/Email/Address:** \_\_\_\_\_

**Costs:** \_\_\_\_\_

**Other Details:** \_\_\_\_\_

★ ★ ★ ★ ★ ★

**NAME:** \_\_\_\_\_

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**Costs:** \_\_\_\_\_

**Other Details:** \_\_\_\_\_

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**Phone/Email/Address:** \_\_\_\_\_

**Costs:** \_\_\_\_\_

**Other Details:** \_\_\_\_\_



# Purposes of a Job Description

**For the employer:**

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**For the employee:**

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**How they can be used:**

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# PA Job Description (SAMPLE A)

*You will receive verbal instructions when needed.*

## These are the primary duties for the morning (7-9am):

- unplug wheelchair
- change external catheter—  
remove old catheter  
*clean and dry lower body\**  
attach new catheter  
attach leg drainage bag
- empty and rinse out night drainage bag
- wash feet and legs
- range of motion exercises—stretch  
hamstrings, achilles tendon, toes, hips
- put on clothes (lower body): support  
hose and socks, pants
- transfer into wheelchair
- put on shoes
- wash hair and upper body
- comb hair
- put on clothes (upper body): undershirt,  
over shirt, sweater...etc
- prepare breakfast
- put on eating apparatus
- give me food. While I eat you'll...
  - make bed, change sheets if  
necessary
  - put dirty clothes in hamper
  - do dishes
  - wipe kitchen counter
- fill water container
- make and wrap lunch
- assist in organization for rest of day:  
music in CD player  
reading material in right spot
- housework: laundry, vacuum, kitchen,  
wipe off things... etc.
- errands: pharmacy, bank... etc

*\* On rare occasions urinary or bowel  
accidents require different cleaning  
attention*

**\*\*Note:** most of the time my friend will  
already have done this

## Duties for evening shift:

- Prepare evening snack
- brush teeth
- stretch arms
- transfer into bed
- undress
- attach night urinary drainage bag
- drain and rinse leg bag
- plug in wheelchair to charger\*\*

## Bowel program

- prepare tissues
- turn on side
- place blue pad (or old towels)
- powder in exam gloves
- lubricate index finger
- depact bowel chamber of hard stool  
with finger
- insert suppository
- dispose of stool in toilet
- wait 15–20 minutes
- check for results
- wait another 15–20 minutes
- do digital stimulation if needed
- repeat last three steps if needed
- clean up and wash area
- straighten body in bed

## During bowel program

- laundry
- clip finger nails
- dishes
- wipe off counters
- other light housework

## After bowel program

- prepare light snack
- give medications
- set TV timer
- turn off lights
- lock doors on way out

## PA Job Description (SAMPLE B)

### Expectations of All Assistants:

★ Dependability ★ Punctuality ★ Confidentiality ★ Honesty ★ Good humor

### My Likes that Will Affect Us Working Together:

★ Sports ★ Music ★ Romantic Movies ★ Fishing ★ Reading ★ Quiet Time

### Job Responsibilities:

- ❖ Assist with activities of daily living
  - Meal preparation and feeding
  - Dressing & undressing
  - Personal grooming & hygiene
  - Transfer to and from wheelchair
  - Administering medication
- ❖ Assist with the development of our project
  - Attend GROW or any other relevant classes related to starting a small business.
  - Research & development
  - Network with the community
  - Contribute to the overall process of starting a small business
  - Assist in work with project once it's up and running
- ❖ Leisure activities
  - Assist in leisure activities as requested. For example but not limited to: reading, praying, movies & plays, crafts etc...
- ❖ Appointments
  - Assist and transport in my vehicle to pertinent appointments as requested. For example, but not limited to: doctor, dentist, beauty salon, or business-related meetings.
- ❖ Miscellaneous
  - Any other activity that assists me in having a great life—not limited to above mentioned—as I request.



# My House Rules

*As my personal assistant, you are welcome into my home. These rules will help us work together with respect and understanding.*

## ★ Smoking

- ☐ Is OK in the house.
- ☐ Isn't allowed in the house.
- ☐ Is ☐ Isn't OK outside during breaks

## ★ Breaks while working

- ☐ For every \_\_\_\_ hours of work, there is a \_\_\_\_ minute break as planned in advance
- ☐ Ask me if you would like a break at other times
- ☐ There are no breaks during the shifts as planned

## ★ Personal calls during work hours

- ☐ Are not allowed, except for emergencies ☐ Are allowed during breaks only
- ☐ Are OK, but keep them to a minimum

## ★ Use of my phone

- ☐ Is not allowed. I expect you to have your own phone to use
- ☐ Is not allowed, except for emergencies ☐ Is OK, but keep calls to a minimum

## ★ TV

- ☐ Is available when work is done and you watch with me ☐ Is not available

## ★ Food and drink

- ☐ Please plan to not eat or drink during your shifts
- ☐ You may bring in your own food and drink to have during your break
- ☐ You are welcome to my food and drink ☐ with permission ☐ anytime

## ★ Bringing others to work

- ☐ Is not allowed ☐ Is not allowed, except for emergencies
- ☐ Is OK, but keep visits to a minimum

## ★ Use of my laundry

- ☐ Is not allowed
- ☐ Is OK ☐ with permission ☐ any time ☐ with your soap ☐ use my soap

## ★ Other

# My Personal Assistant Job Description

## Expectations of All Assistants:

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## My Preferences that Will Affect Our Working Together:

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## Job Responsibilities:

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## A Fictional Consumer's Staffing Plan and PA Schedule—Sherry

### Staffing Plan

Total allotted hours (paid for by program):	42
Total # of hours needed (based on PA planning list):	42

### Staffing Possibilities:

#### Option One

- Hire 3 part-time personal assistants:
- One PA to work p/t in the mornings (20 hours)
  - One PA to work p/t in the evenings (10 hours total)
  - One PA to work p/t on the weekends (12 hours)

#### Option Two:

- Hire 2 part-time personal assistants:
- One PA to work evenings and weekends (22 hours)
  - One PA to work mornings and afternoons (20 hours)

#### Option Three:

- Hire one live-in PA:
- The live-in would get paid for the 42 hours and provide extra services as needed in exchange for a place to live.

Sherry decides on **Option One** and will seek to fill those positions. In addition, Sherry will seek to find 3 back-up PAs willing to be oriented in case she needs to cover a shift her regularly scheduled PAs cannot work.

### Personal Assistance Schedule (based on Option One)

	Personal Assistant One	Personal Assistant Two	Personal Assistant Three
<b>Monday</b>	9:00 am–1:00 pm	6:00–8:00 pm	
<b>Tuesday</b>	9:00 am–12:00 pm	6:00–8:00 pm	
<b>Wednesday</b>	9:00 am–2:00 pm	6:00–8:00 pm	
<b>Thursday</b>	9:00 am–2:00 pm	6:00–8:00 pm	
<b>Friday</b>	9:00 am–12:00 pm	6:00–8:00 pm	
<b>Saturday</b>			11:00 am–5:00 pm
<b>Sunday</b>			11:00 am–5:00 pm
<b>Total Hours</b>	20	10	12



## A Fictional Consumer's Staffing Plan and PA Schedule—Irene

### Staffing Plan

Total allotted hours (paid for by program): 20  
Total # of hours needed (based on PA planning list): 21\*

\* Irene hopes her children or friends will provide her with the extra driving time she will need.

### Staffing Possibilities:

#### Option One

Hire 2 part-time personal assistants:

- One PA to work p/t during the week (13–15 hours, depending on when large house cleaning gets done)
- One PA to work p/t on the weekends (5–7 hours, depending on house cleaning)

#### Option Two:

Hire 1 part-time personal assistant:

One PA to work all hours (20 hours)

Irene decides to leave both options open, so that she can pick the one that will suit the candidates she finds. Irene also hopes to find at least 1 back-up PA to help in case she needs to cover a shift her regularly scheduled PAs cannot work.

### Personal Assistance Schedule Possibilities:

	Week Days	Weekends
<b>Monday</b>	3:00 pm–5:00 pm	
<b>Tuesday</b>	8:00 am–12:00 pm 12:00 pm–2:00 (if housekeeping)	
<b>Wednesday</b>	4:00 am–6:00 pm	
<b>Thursday</b>	8:00 am–12:00 pm	
<b>Friday</b>	3:00 pm–4:00 pm	
<b>Saturday</b>		10:00 am–12:00 pm; 12:00 pm– 2:00 pm (if housekeeping)
<b>Sunday</b>		8:00 am–9:30 am; 11:00 am– 12:30 pm
<b>Total Hours</b>	13–15	5–7

## A Fictional Consumer's Staffing Plan and PA Schedule—Enrique

### Staffing Plan

Total allotted hours (paid for by program):	50
Total # of hours needed (based on PA planning list):	50

### Staffing Possibilities:

#### Option One

Hire 3 part-time personal assistants:

- One PA to work in the mornings and evenings (35 hours)
- One PA to work as a driver (10 hours)
- One PA to work as a housekeeper (5 hours)

#### Option Two:

Hire 2 part-time personal assistants:

- One PA to work week days (38 hours)
- One PA to work weekends (12 hours)

Enrique prefers **Option Two**, so that two people understand his ADL/medical needs, can provide back-up to one another, and create fewer scheduling hassles. However, he likes the idea of having different people for housekeeping and driving so no one gets too involved in his life. He won't have a live-in PA because he doesn't want to share his house with others and so that his daughter can visit. He also wants to have 1 back-up PA willing to be oriented in case he or she needs to cover regularly scheduled PA shifts. He plans to keep his options open as he interviews candidates.

### Personal Assistance Schedule (based on Option Two)

	Personal Assistant One	Personal Assistant Two
<b>Monday</b>	9:00 am—12:00 pm; 2 flexible afternoon hours; 8:00 pm—10:00 pm	
<b>Tuesday</b>	9:00 am—12:00 pm; 2 flexible afternoon hours; 8:00 pm—10:00 pm	
<b>Wednesday</b>	9:00 am—12:00 pm; 3 flexible afternoon hours; 8:00 pm—10:00 pm	
<b>Thursday</b>	9:00 am—12:00 pm; 2 flexible afternoon hours; 8:00 pm—10:00 pm	
<b>Friday</b>	9:00 am—12:00 pm; 4 flexible afternoon hours; 8:00 pm—10:00 pm	
<b>Saturday</b>		9:00 am—12:00 pm; 2 flexible afternoon hours; 8:00 pm—10:00 p.m.
<b>Sunday</b>		9:00 am—12:00 pm; 8:00 pm—10:00 pm
<b>Total Hours</b>	38	12

## My Staffing Plan and PA Schedule

### Staffing Plan

Total allotted hours (paid for by program): \_\_\_\_\_

Total number of hours needed (based on your "Snapshot of Me"): \_\_\_\_\_

#### Staffing Possibilities:

**Option One:**

**Option Two:**

**Option Three:**

First Choice Option: \_\_\_\_\_

Second Choice Option: \_\_\_\_\_

Number of Back-Up PA's desired: \_\_\_\_\_

### Personal Assistance Schedule (based on Option One)

	PA One	PA Two	PA Three	PA Four
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				
Total Hours				

## **TO GET THE BEST MATCH FROM THE HIRING PROCESS**

### ***You Need to...***

- ◆ Be aware of your needs and preferences
- ◆ Clearly express your needs and preferences to each candidate
- ◆ Be aware of what trade-offs and compromises you are willing to make to fulfill your staffing needs
- ◆ Focus on getting closest to the right match and your “must haves”



## IN-PERSON INTERVIEWS

### Things to Be Sure to Cover:

- ◆ Give the candidate a general sense of the job
- ◆ Show the candidate this is a job he or she would enjoy
- ◆ Get a sense of the candidate as a PA and as a person
- ◆ Start the relationship-building process
- ◆ Learn what skills the candidate brings to the job of PA
- ◆ Give the candidate a chance to ask questions—if he or she has them.

# Decisions Regarding Your Interview

## 1. Who should be part of the interview? Why?

- Consumer only?
- Family member?
- Current PA?
- Other(s)?

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## 2. Where should the interviews take place? Why?

- Consumer's home
- Another location

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## 3. What do you want to learn *from* the candidate?

- PA's skills
- Work experience
- Relevant training
- Attitudes
- Personal qualities

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## 4. What do you want to communicate *to* the candidate about the job and you?

- Salary & benefits
- Schedule
- Your Flexibility
- Your preferences

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## 5. What materials or "props" do you want to have with you?

- Job Description
- Application form
- List of questions
- Pad of paper
- Equipment to demonstrate

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## Application for Employment (SAMPLE)

Full Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Driver's License or State ID Number: \_\_\_\_\_

1. Do you have reliable transportation? \_\_\_\_\_

2. What days are you available to work mornings 9:00 a.m. – Noon?

(Circle) M Tu W Th F Sat Sun

3. Have you ever been convicted of a felony? ☐ Yes ☐ No

If yes, please describe: \_\_\_\_\_

\_\_\_\_\_

4. Are you willing to substitute as a back-up if needed? ☐ Yes ☐ No

5. Are there any reasons that might cause you to be late or miss work (excluding acts of God or other unpredictable causes)? ☐ Yes ☐ No

If yes, please describe: \_\_\_\_\_

\_\_\_\_\_

6. Do you understand that failure to come to work leaves me in a potentially life-threatening situation? ☐ Yes ☐ No

7. If necessary, are you willing to be a little flexible with the hours worked (come in an hour earlier, stay a little longer)? ☐ Yes ☐ No

8. Are you willing to sign a mutually agreed upon employment agreement?

☐ Yes ☐ No

9. Can you commit to working for a minimum of six months? ☐ Yes ☐ No

10. Please add any information that you feel I should know but have not asked about.

\_\_\_\_\_

\_\_\_\_\_



## EMPLOYMENT HISTORY

Please list where you have worked over the past two years.

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Dates worked	Employer	Address	Phone
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Dates worked	Employer	Address	Phone
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Dates worked	Employer	Address	Phone
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## CHARACTER REFERENCES

Please give two or three names of people who can be contacted regarding your character.

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Name	Address (optional)	Phone (day)	Phone (eve)
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Name	Address (optional)	Phone (day)	Phone (eve)
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Name	Address (optional)	Phone (day)	Phone (eve)
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By signing below, I certify that all the information on this application is true to the best of my knowledge. I further authorize employer to contact past employers and character references listed above for employment-related purposes.

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Applicant Signature

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Date

## EXAMPLES OF CLOSED VS. OPEN-ENDED QUESTIONS

### **Drugs/Alcohol:**

**Closed:** Would you work with someone who drinks?

**Open:** What do you think about people who drink or do drugs?

### **Personality/Friendliness:**

**Closed:** Do you have a lot of friends? Do you like to go out?

**Open:** How do you spend your free time? How would your best friend describe you?

### **Sense of Humor/Personality:**

**Closed:** Do you have a sense of humor?

**Open:** What makes you laugh?

### **Cooking:**

**Closed:** Do you like to cook? Can you cook? Would you be able to cook for me?

**Open:** If you were to prepare your favorite meal for me, what would it be?

### **Flexibility/Availability:**

**Closed:** Do you think you have time to do this job given my schedule?

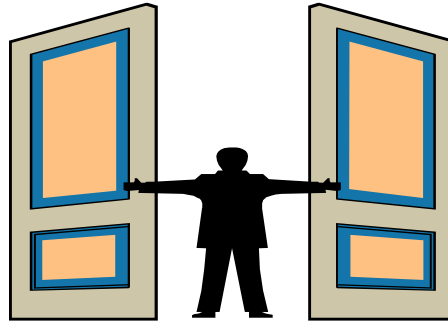
**Open:** What are some of responsibilities in your life right now? How will you fit the schedule I require in with your current responsibilities?

### **Computer:**

**Closed:** Can you use the computer?

**Open:** How do you feel about working with computers? What programs do you use on the computer? What do you like about the ones you use? What frustrates you when you use them?

# Make It Open



1. Are you trained?
2. Do you have any experience as a personal assistant?
3. Can you be here in the mornings?
4. Would you buy alcohol if I asked?
5. Can you clean a catheter?
6. Do you like cats and dogs?
7. Can you cook?
8. Can you work weekends?
9. Do you like going out?
10. Have you done drugs?
11. Can you clean?
12. Can you clean a wheelchair?

Come up with more open-ended or behavioral questions that are relevant for your particular situation:

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# Questions I'd Ask at My Interview

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Good Questions Classmates Suggested ...and I Want to Remember:

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# QC3 CONSUMER INTERVIEW GUIDE

*Asking open question, and following up with clarifying questions when you want more information will give you a much clearer sense of your candidates!*

## **PHONE INTERVIEWS/PRE-SCREENING:**

1. **THINK THROUGH THE THINGS YOU MUST KNOW TO PROCEED WITH A FACE-TO-FACE INTERVIEW.** It helps to have the questions written out in advance. They may include:
  - Do you have experience with, and are you OK with handling any specific or unusual tasks I need you to perform, i.e. cutting toe nails, helping with bowel movements?
  - Can you work the specific hours I need you to?
  - Do you understand the pay in this county is \$\_\_\_\_\_?
  - How long a commitment can you make to this job?
  - Do you have reliable transportation for getting to work? Please explain.
  - Will you be able to use your vehicle for running errands with me? OR: Are you OK running errands?
  - I have a cat (dog, bird, fish...). Will you help feeding and cleaning up after them?
  - These are the physical demands of the job ... (give specific information). Can you perform them without any trouble?
  - Can you be flexible day-to-day about the schedule and assigned tasks?
  - Can you cook? What are your favorite dishes to cook? Will you cook for the job?
  - When are you available to start work?
  - Do you smoke? If yes, I do/don't allow smoking in my house? How many breaks per shift will you need to smoke?
2. **DON'T FORGET THAT CANDIDATES MAY HAVE QUESTIONS TOO! ASK IF THEY HAVE ANY.**
3. **REVIEW WITH THE CANDIDATE WHAT YOU WANT HIM OR HER TO BRING TO THE FACE-TO-FACE INTERVIEW.** This may include:
  - ☐ References    ☐ Identification    ☐ Driver's License    ☐ Criminal Background Check

(Remember QC3-approved Providers have had at least 3 positive references as well as limited background checks completed every 6 months.)

## **PLANNING FOR FACE-TO-FACE INTERVIEWS:**

### **1. Think through what you want to learn about candidates. It may include:**

- That they have been reliable employees in the past
- That they will be flexible about the schedule and assignments
- If they really want to do the job
- Who they might bring into your home (for example, their children, spouse, etc.)
- To see their identification (and record their ID number as security)
- To know if they're physically capable of doing the job.
- To learn about their skills, training and education
- To learn about their personality and if they have a cooperative attitude

### **2. Plan what you want to explain and how you want to establish the relationship, such as:**

- Your expectations about their reliability, cooperation, compassion
- Your desire that they be self-directed and do their work without repeated instruction and supervision
- What the pay schedule is and the process for being paid
- What the minimum time commitment they must give is: for example, six months
- How they will learn the job, and how long it takes for them to be fully trained
- Establishing a professional relationship
- Your house rules (these may include your policies about smoking, breaks, taking personal calls during work hours, TV, bringing others to work, eating your food and drink, using your laundry)

### **3. Prepare whatever materials, “props” or people you want to have with you. These may include:**

- List of interview questions to help you remember and ensure that you ask everything you want
- Job description, DHS Personal Assistance Plan, or list of duties, etc.
- Any forms you want to use: work agreements, application, DHS forms, etc.
- Who, if anyone, you want at the interview (an experienced provider, family member, friend, etc.)

### **FACE-TO-FACE INTERVIEWS:**

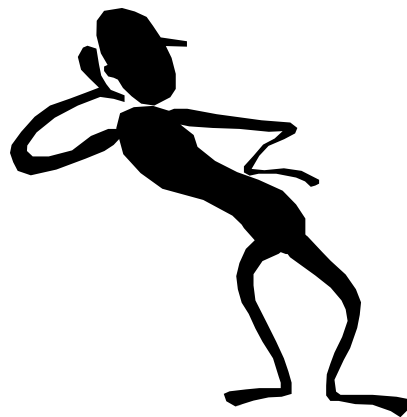
**Prepare your questions in advance!** These may include ones from the phone interview and:

1. May I see your ID?
2. What hours and days are you available?
3. Given the Personal Assistance Plan/Job Description, what are your expectations about this job? What tasks are you most familiar with? Are there any you've never handled? Do any concern you?
4. Could you please describe the training and education you have that will help you do this job well?
5. Do you have reliable transportation for getting to work? Please explain. What circumstances might come up that would leave you without the use of your vehicle (or other transportation)?
6. Will you be able to use your vehicle for errands with me? Do you own it? Who shares it with you? May I see your license? Please tell me about tickets or accidents you've had in the past 5-10 years.
7. Do you have any concerns about my house rules (breaks, smoking, guests, food, phone use, etc.)
8. Knowing there are a limited number of hours of work approved in the month, if things didn't go according to plan and I still needed your help at the end of a shift, how would you handle it?
9. In your last job, how many times a month were you late or absent? What were the usual causes? If you were getting ready to come to work and a family emergency came up – your child was sick, the baby sitter didn't come, your car broke down – how would you handle it?
10. Can you think of a really difficult situation that's come up during your prior employment and describe to me how you handled it?
11. Could you please describe a disagreement that you've had in a past job and how you handled it?
12. When can you start?
13. Do you understand that the DHS Medicaid Home Help program pays monthly?
14. Knowing I require a 6-month minimum commitment, how long can you commit to staying on this job? What affects the length of time you're giving me?
15. How would you handle it if I passed out? ...or had a seizure? (or other infrequent, but possible, dramatic circumstances)
16. What would you like me to know about you?
17. What would you like to know about me?
18. Would you come in on your own time for a demonstration and orientation?

## ***REAL* Listening Is...**

***Based on the intention to do  
at least one of four things:***

- ◆ Understanding the other person
- ◆ Enjoying the other person
- ◆ Learning something from (or with) the other person
- ◆ Giving help or solace (empathy or sympathy)





# Active Listening



Good listening is essential to clear, effective communication and is of primary importance in interviewing and hiring PAs.

Good listening is active, not passive. Active listening is a skill that must be learned and practiced since it is not something people are taught or often experience. It involves:

- ♦ **Using attentive body language**, including posture, facial expression, eye contact and gestures.
- ♦ **Asking open-ended questions** to gather information.
- ♦ **Using paraphrasing** to ensure mutual understanding.

**Active listening is a vital skill in interviewing and hiring PAs** because:

- ♦ **When people listen with their full attention, they remember and understand more** of what is being communicated. On the other hand, when they listen inattentively, they miss a great deal of what is being communicated.
- ♦ **Being actively listened to feels caring and is helpful to the speaker, allowing him or her to fully express themselves.** Being listened to inattentively feels hurtful and unhelpful.
- ♦ **A candidate is more likely to be interested in a position** and remain in the position once hired if he or she feels listened to by an employer.

# Lead-Ins for Paraphrasing

DID I HEAR YOU SAY.....

DID YOU SAY.....

SO, I THINK YOU SAID.....

OK, SO WHAT I HEARD YOU SAY IS.....

SO I UNDERSTAND YOU SAID.....

AM I HEARING YOU CORRECTLY THAT.....

ARE YOU SAYING THAT.....

AM I HEARING YOU CLEARLY THAT.....

I BELIEVE THAT YOU ARE SAYING.....

SO, YOU'RE SAYING.....

OK, LET ME SEE IF I GOT WHAT YOU SAID....

## Tips on Ending an Interview

- ◆ **Thank** the candidate for meeting with you.
- ◆ **Ask if he or she has any other questions.**
- ◆ **Communicate clearly** with the candidate about your next steps –
  - *"I expect to interview 2 more candidates and hope to make a decision by next week."*
  - *"I expect to make a preliminary decision by Friday and would like any serious candidate to meet with me and my current PA as a next step in the process."*
- ◆ **Give a specific message** to the candidate for him or her to think about. It will help you check on follow-through and reliability to ask the candidate to call *you* back.
  - *"I want you to think a little more about the responsibilities for this position and, if you are still interested in it, give me a call tomorrow between 10 a.m. and 2 p.m."*